



# Santrax® Agency Management and Santrax® Payor Management 6.9.23

Release Date: Thursday, February 1, 2018  
UNIVERSAL RELEASE NOTES

The content of the enclosed Release Notes is dependent upon final Quality Assurance validation. If you have any questions or concerns about the content therein, please contact Customer Care at your agency's designated telephone number. The final version will be available in your online library post-release.

*Valued Provider:*

*We are now including all items in the release notes. They may or may not apply to your configuration. In reviewing the notes below, please refer to the "prerequisites" line which indicates the required functionality, product, or audience associated with the item.*

*If the functionality is not automatically available, please contact your Sales Representative or Customer Care for additional information.*

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## STAFF

### 1. ALLOW IN-SERVICE COMPLIANCE CALCULATIONS TO RESET FOR REHIRED STAFF.

Changes have been made to accommodate employees who have been terminated and rehired. When a staff member is rehired, the staff member's in-service compliance period will recalculate. This new compliance date is reset based on the staff member's rehire date and allows the allotted time period before the employee must complete the compliance item. The staff member will remain compliant until the time period expires.

**Prerequisite:** None

### 2. MODIFIED STAFF ADVANCED SEARCH.

Modifications were made to ensure that when the **Reason** filter (**Secondary Status**) is selected, the results will reflect that selection.

**Prerequisite:** None

The screenshot shows the 'Staff Search' window with various search filters. The 'Reason' dropdown menu is open and highlighted with a red box. The options listed are: A- Active, C- In Class, H- Rehire, K- Casual, and V- Visit. Other filters include Company, Location, Agency, Team, Status (02- Active), First Name, Last Name, Agency ID, SSN, County, ZIP, Region, Proximity, Service, Manager, Position, Internal Staff (checked), Language, Availability, Prev Worked, Date (01/30/2018), and From/To fields.

## BILLING

### 3. MODIFIED BILLING EXPORT.

Modifications were made to ensure that complete reference numbers display in box 64 of the UB04 billing format.

**Prerequisite:** None

### 4. UPLOADING VNS REMITTANCE FILES.

The VNS remittance file can now be uploaded through the Electronic Remittance feature.

**Prerequisite:** None

## JURISDICTIONAL VIEW

### 5. NEW SOURCE INDICATOR ADDED TO JURISDICTIONAL LATE MISSED VISIT DETAIL REPORT.

Add a new column, **Source**, to the Jurisdictional **Late Missed Visit Report**. This field indicates the source of the reason for the late or missed visit. The field indicates three possible sources:

- **M:** Member
- **A:** Agency
- **P:** Payer

**Prerequisite:** Jurisdictional View User

Agency	Agency	Member	Client ID	Address	Date Of	Author	Service	Site	Schedul	Schedul	Actual H	Employe	Employe	Late M	Late M	Service	Late M	Made U	Made U	Made U	Result	Fee Ret	Memo C	Is On TL	Source	Indicator
Alf and As	4258327				3/2/2014		Personal C	5818289	*****	*****				550635		In Process						N		Y		
Alf and As	4258327				3/3/2014		Personal C	5818290	*****	*****				550635		In Process						N		Y		
Alf and As	4258327				3/4/2014		Personal C	5818291	*****	*****				550635		In Process						N		Y		
Alf and As	4258327				3/5/2014		Personal C	5818292	*****	*****				550635		In Process						N		Y		
Alf and As	4258327				3/6/2014		Personal C	5818293	*****	*****				550635		In Process						N		Y		
Alf and As	4258327				3/9/2014		Personal C	5818298	*****	*****				550635		In Process						N		Y		
Alf and As	4258327				*****		Personal C	5818299	*****	*****				550635		In Process						N		Y		
Alf and As	4258327				*****		Personal C	5818300	*****	*****				550635		In Process						N		Y		
Alf and As	4258327				*****		Personal C	5818301	*****	*****				550635		In Process						N		Y		
Alf and As	4258327				*****		Personal C	5818302	*****	*****				550635		In Process						N		Y		
Alf and As	4258327				*****		Personal C	5818307	*****	*****				550635		In Process						N		Y		
Alf and As	4258327				*****		Personal C	5818305	*****	*****				550635		In Process						N		Y		
Alf and As	4258327				*****		Personal C	5818305	*****	*****				795275		In Process						N		Y		
Alf and As	4258327				*****		Personal C	5818310	*****	*****				795275		In Process						N		Y		
Alf and As	4258327				*****		Personal C	5818311	*****	*****				795275	MISD	Member/M	MISSED	N	Visit was Not Made	U/MLR/D4	N	MISSED	N	M		
Alf and As	4258327				*****		Personal C	5861781	*****	*****				61157		In Process						N				
Alf and As	4258327				*****		Personal C	5861782	*****	*****				MISD	Member/M	MISSED	N	Visit was Not Made	U/MLR/D4	N	Client not	N		P		
Alf and As	4258327				*****		Personal C	5861783	*****	*****				MISD	Member/M	MISSED	N	Visit was Not Made	U/MLR/D4	N	Client not	N				
Alf and As	4258327				*****		Personal C	5861784	*****	*****				MISD	Member/M	MISSED	N	Visit was Not Made	U/MLR/D4	N	MISSED	N		A		
Alf and As	4258327				*****		Personal C	5861785	*****	*****				MISD	Member/M	MISSED	N	Visit was Not Made	U/MLR/D4	N	Client is not	N				
Alf and As	4258327				*****		Personal C	5861786	*****	*****				158862		In Process						N		Y		
Alf and As	4258327				3/2/2014		Personal C	3703537	*****	*****				753171		In Process						N		Y		
Alf and As	4258327				3/4/2014		Personal C	3703538	*****	*****				753171		In Process						N		Y		
Alf and As	4258327				3/6/2014		Personal C	3868820	*****	*****				753171		In Process						N		Y		
Alf and As	4258327				3/9/2014		Personal C	3703539	*****	*****				753171		In Process						N		Y		
Alf and As	4258327				*****		Personal C	3703540	*****	*****				753171		In Process						N		Y		

## REPORTS

### 6. REPORT MODIFICATIONS - SPEAKER VERIFICATION ENROLLMENT STATUS & STAFF LIST REPORTS.

Modifications were made in the **Staff List** and **Enrollment Status** reports to ensure all employees missing speaker verification enrollment data are included regardless of the number of digits in their Santrax ID.

**Prerequisite:** None



